



FIELD REP POCKET GUIDE

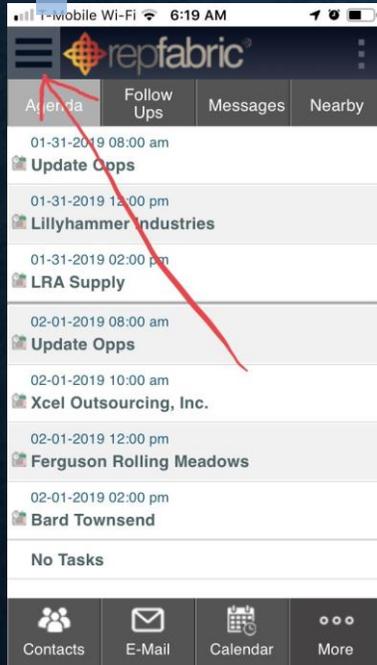
BASIC SKILLS YOU'LL FIND HERE

- Create New Company/Contact
- Prep for a sales call
- Find nearby opportunity
- Capture notes/set reminders
- Create Opportunities
- Use Sync+ to add contacts
- Create Opportunity in Sync+

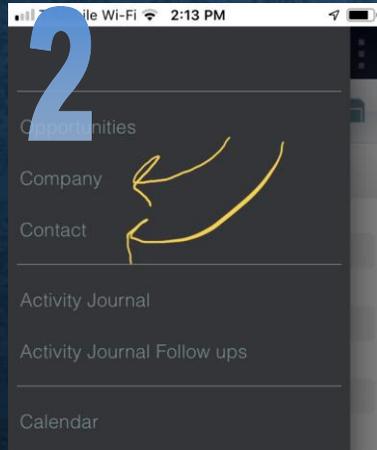
CREATE NEW COMPANY OR CONTACT

1

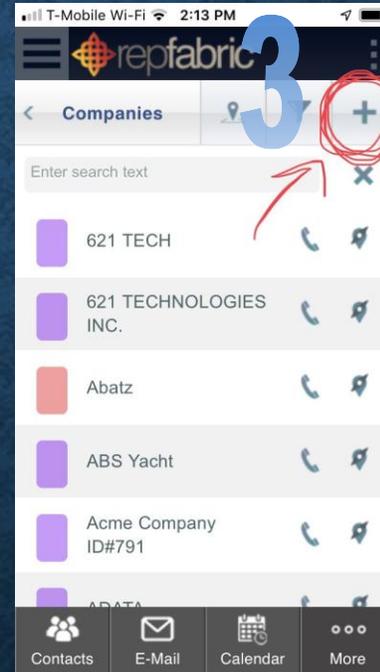
1) From the home screen, click on the “hamburger” menu that looks like three black lines on the dark grey square.



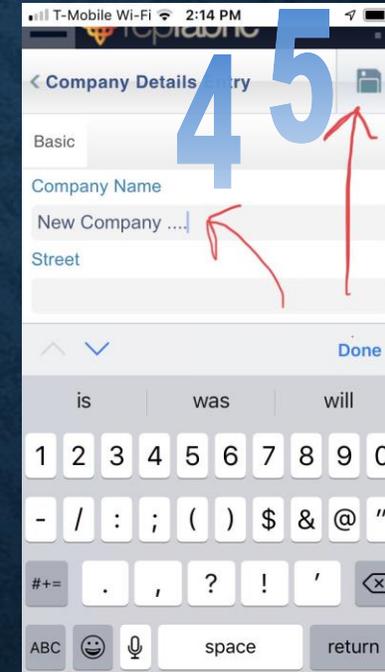
2) Click company or contact to create the one you want.



3) Use the plus sign to add a new record.

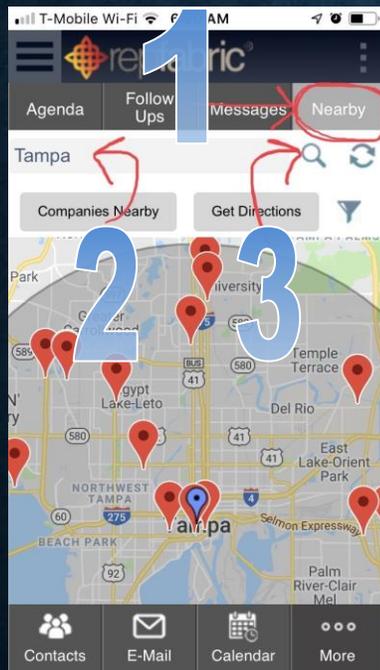


4) Add details.
5) Hit save.



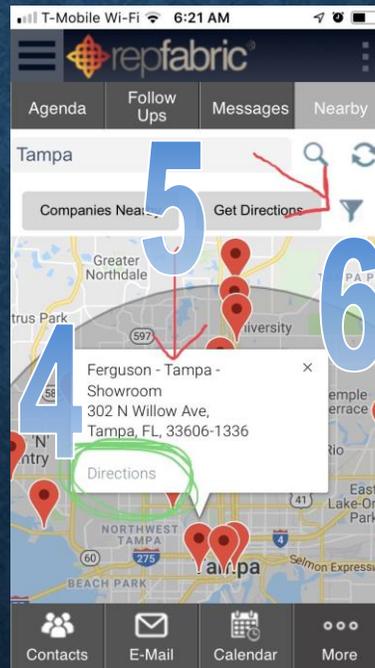
USE NEARBY TO FIND BEST DROP-IN & FILTER COMPANIES

- 1) From the home screen, click on nearby to use the map.
- 2) Enter name of city where you'll be making sales calls.

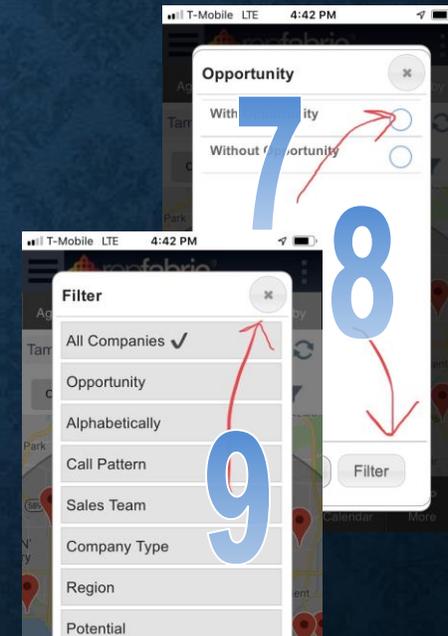


- 3) Hit magnifier glass for search to take affect.
- 4) After you click on a red pin, click Directions for Google Maps to launch.
- 5) Click on name of company for account details (like prepping for a sales call).

- 6) Use Funnel icon to filter company records.
- 7) Select a filter and option that applies.



- 8) Apply the filter by clicking "filter" at bottom.
- 9) Close Filter Options menu by clicking X.



ADD CONTACTS & OPPORTUNITIES IN SYNC+

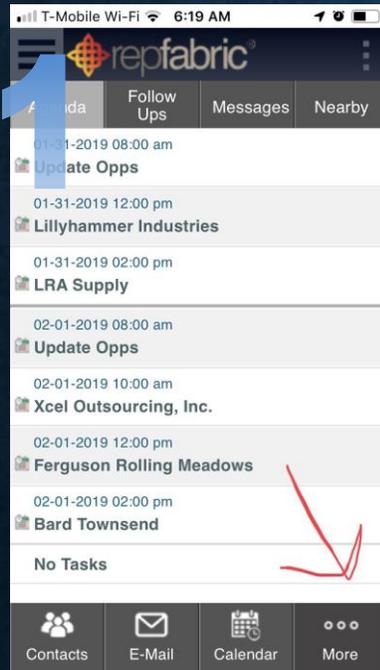
- 1) Open Sync+ with home tab selected and 2) body of email visible. (Reading panes off won't work.) 3) Green + icon is a prompt to add that contact. Click it, fill in details, save. 4) Purple business card icons, mean that is a contact already saved in your contacts.
- 5) Gold crowns are opportunities. This (?) shows there is no opp yet.
- 6) Click plus, 7) click "New Opportunity"
- 8) Fill in details of opp.
- 9) Hit save

TIP: the pencil lets you edit. The square with an arrow is a shortcut to Repfabric.

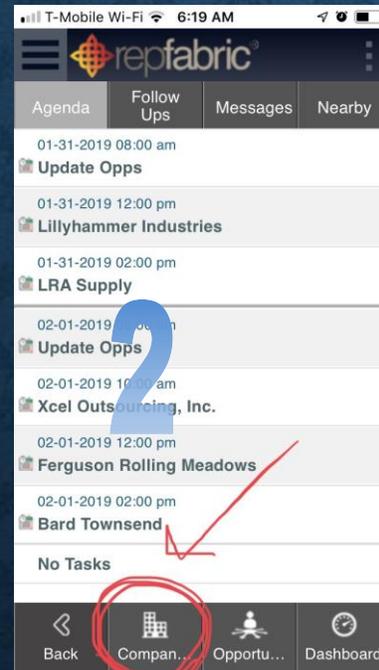


HOW TO PREP FOR A SALES CALL (1 OF 2)

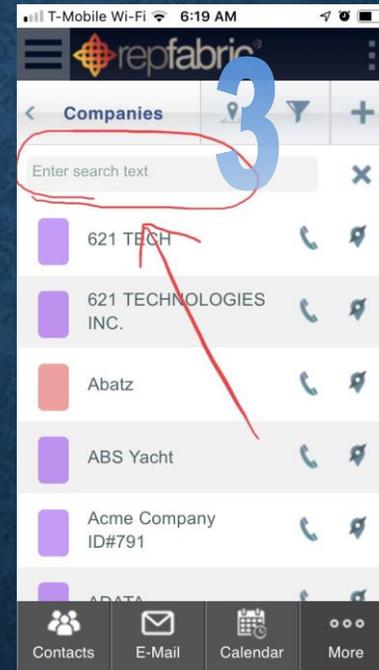
1) From the home screen, click on the more button at the bottom.



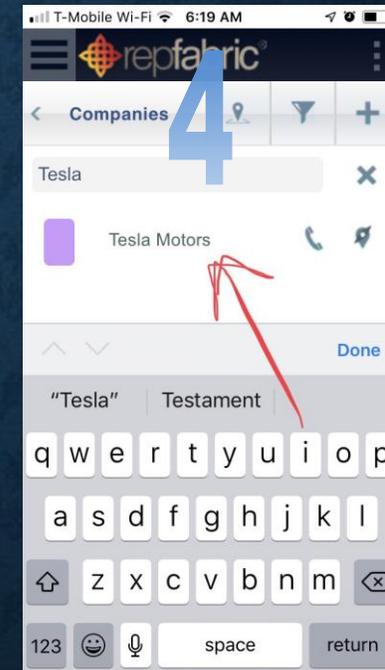
2) Then click on companies button.



3) Enter the account you're prepping for.

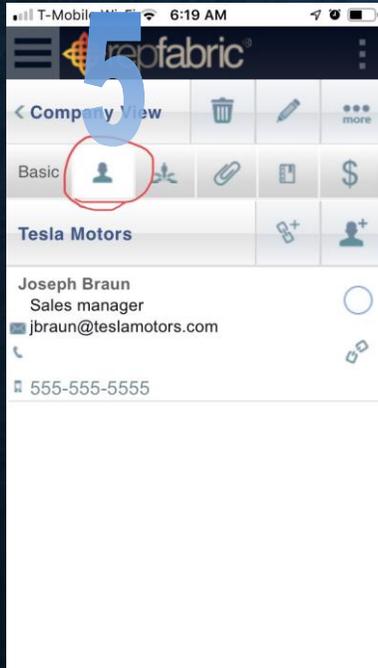


4) Click anywhere on or near the name to open the record.

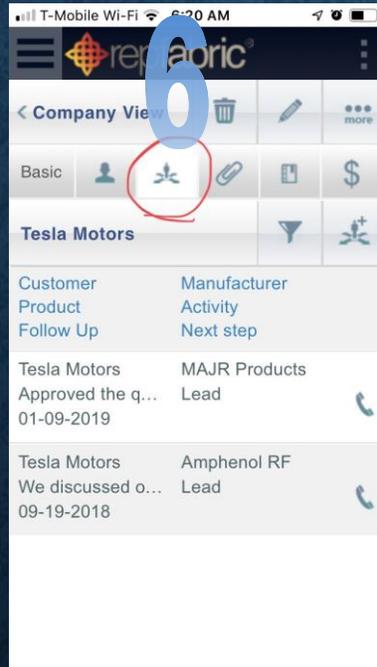


HOW TO PREP FOR A SALES CALL (2 OF 2)

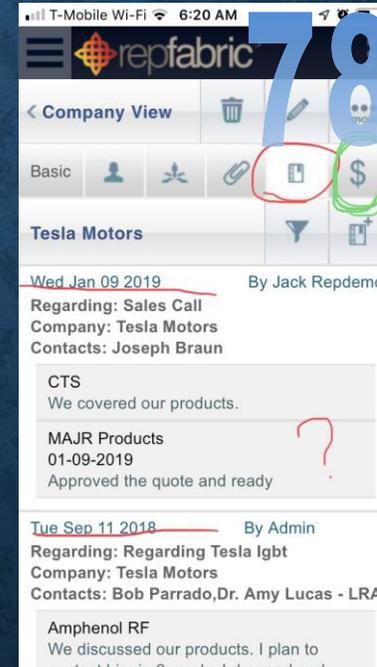
5) Click the people icon to see who your contacts are at this company or location.



6) Click the opportunities icon to see all open deals.



7) Click the journal to see notes on past calls. Notice the dates and if anything needs follow up.
8) Click \$ for dashboard.

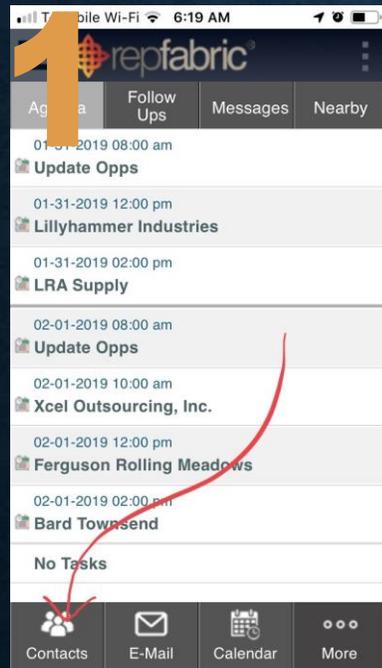


9) Roll the year to the period you want.
10) For part # specifics, click on manufacturer line.

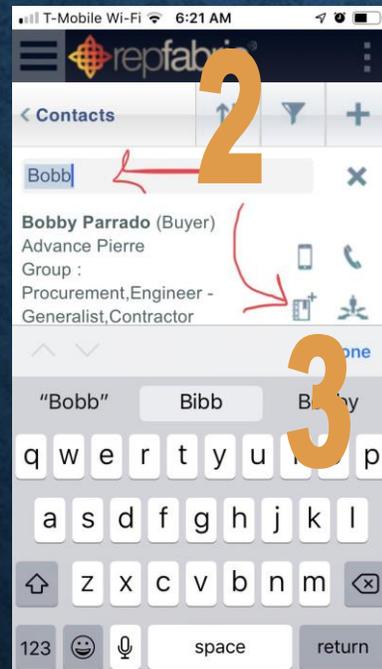


CAPTURE NOTES & SET FOLLOW-UP REMINDERS (1 OF 2)

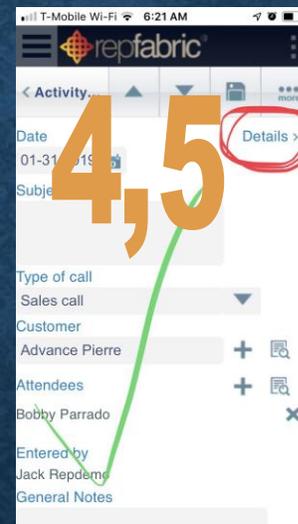
1) Start at contacts from the home screen.



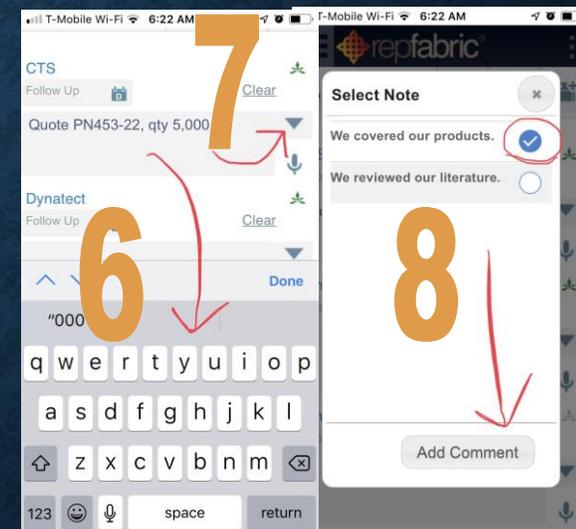
2) Enter a name of who you will visit. 3) Click “add activity journal” icon.



4) Skip the first screen— everything is done. 5) **Click details.**

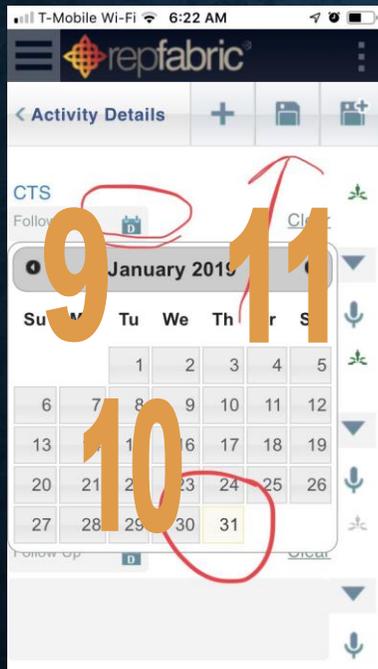


6) Click on the grey box, enter notes with keyboard OR 7) click black triangle to use the pitches. 8) Select phrase, click add comment.

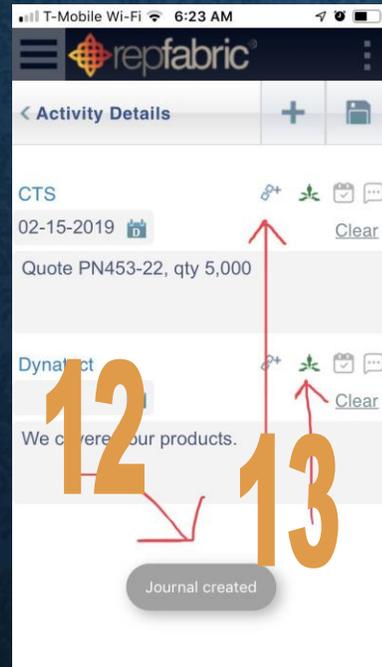


CAPTURE NOTES & SET FOLLOW-UP REMINDERS (2 OF 2)

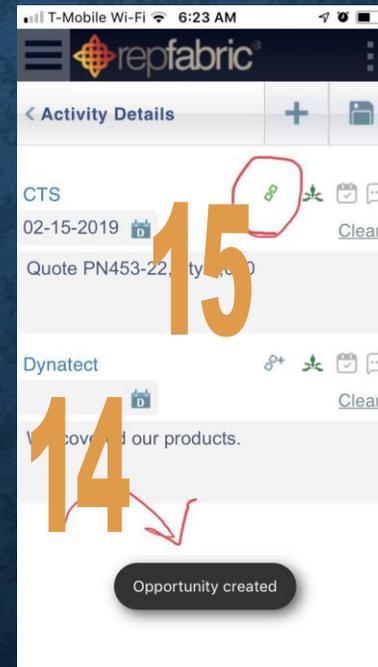
9) Click calendar to add a follow-up date. 10) Pick date. 11) Hit the disk icon to save your activity journal.



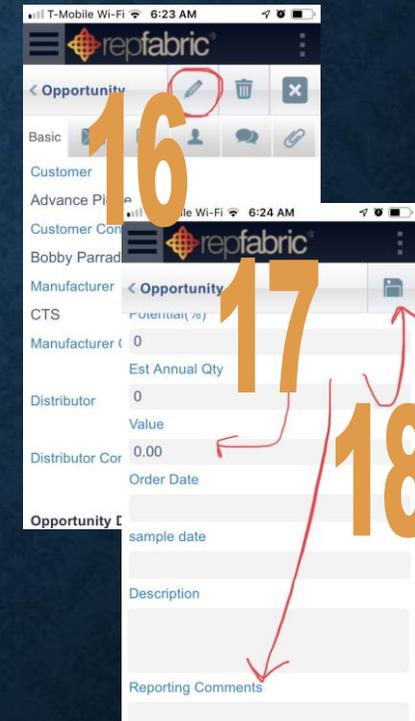
12) Journal saved notice appears. 13a) You can create an opportunity or 13b) update other current opportunities.



14) Opp created notice appears 15) When the + is not there, that is now a shortcut to edit the opportunity.



16) Click the pencil so you can edit fields. 17) Update specifics 18) Save.



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HELP

Tip:



Click the Repfabric logo from any screen to return to the home screen in the app.

Visit: <https://support.repfabric.com>

Email: Support@repfabric.com

Call 844-737-7253

Register for classes here:

<https://tinyurl.com/Repfabric-Training>

